Toolbox 2.0 Exit Functionality Guidance

Toolbox 2 incorporates the Common Measures exit philosophy outlined in TEGL 17-05.

EXIT LOGIC
Toolbox's integrated system will now prevent a customer's record from exiting any Common Measures program (WIOA, WIOA, Trade Act, Labor Exchange and VETS) until the customer is no longer receiving countable services from any of the Common Measures programs. See below for details.

GENERAL EXIT FUNCTIONALITY (see below for exceptions)

Program participation is extended through staff posting at least one core or intensive countable service (list attached) every 90 days. If the customer participates in the same service longer than 90 days, the open service must be closed and an identical service opened every 90 days; this does not apply to training services.

The system will not exit any of the Common Measures programs until 90 days after the last countable service. This includes both the Employment Plan services as well as the 9002 services which post on the Seeker Screen's Seeker Info tab in the "Services Provided" field. Nightly, the system checks for records with open countable service with begin dates more than 60 days old. The system also looks for records with no open countable services with service end dates within the last 60 days. It will task the appropriate counselor(s) with a notification that the customer will exit unless another countable service is posted within 30 days.

WIOA Adult & WIOA Dislocated Worker-SPECIFIC GUIDANCE
Adult and Dislocated Worker Career and Intensive services will only prevent a customer from exiting for 90 days. These are 2000 level services

WOIA Adult & WIOA Dislocated Worker**-**Training level services (3000 series) will keep a record from exiting regardless of the begin date. A WIOA Adult or WIOA Dislocated Worker customer enrolled in a Training-level services (3000 series) will not exit until 90 days after the posted end date for that service.

WIOA Youth-SPECIFIC GUIDANCE

WIOA Youth-602-Alternative Secondary School, 605-Occupational Skills Training (Youth), 615 Pre-apprenticeship Programs, 616 On-the-job Training Opportunities, 617 Internships and Job Shadowing, 619 Education for Workplace Preparation, and 621 Entrepreneurial Skills Training service will keep a record from exiting regardless of the begin date. A WIOA Youth customer enrolled in any of these services will not exit until 90 days after an end date is posted. WIOA Youth customers will not exit until 90 days after the latest Test Date on the Basic Skills Tests tab. All other Youth services will only prevent exit for 90 days.

TRADE ACT-SPECIFIC GUIDANCE
Trade Act customers enrolled in any of the following service will not exit until the end date of the service is posted **and** the Actual Completion date field on the Employment Plan-Progress tab/Training Program sub-tab is completed: Trade Occupational/Vocational Education Training, Trade Basic Skills/Remediation, Trade Pre-Requisite Training, Trade Apprenticeship, and Trade On-the-Job Training(OJT).

Trade Act customers enrolled in a Waiver will not exit until 90 days after the last Contact Date on the Waiver screen.

DRJP SPECIFIC GUIDANCE

DRJP customers enrolled in any of the following services will not exit until the end date of the service is posted: DRJP Adult Education and Literacy, DRJP Customized Training, DRJP Employment, DRJP Entrepreneurial Training, DRJP Job Readiness Training, DRJP Occupational Skills Training, DRJP On-the-Job Training, DRJP Private Sector Training Programs, and DRJP Workplace Training and Cooperative Education.

TASKS

Exit Warning Task

Nightly, the system checks for records with open countable services with begin dates 60 days old. An exit warning task is created when the customer has gone 60 days without a countable service.

Exit Task Functionality

Nightly, the system checks for records with open countable services with begin dates more than 90 days old. The system also looks for records with no open countable services with service end dates within the last 90 days. If either condition is met, it will task the appropriate counselor(s) with a notification that the customer has exited.

There is a hierarchy in how the tasks functions for exit warning tasks and exit tasks.

1. Based on the primary counselor field, system determines if the primary counselor has the ability to enroll the customer into the program(s) in which the customer is enrolled. If the primary counselor has the ability to enroll the customer into the program(s) in which they are enrolled, then the system will send them the task; if not, then #2 occurs.

2. If the primary counselor does not have the access to enroll the customer into the program(s) in which the customer is enrolled, then the system determines if the secondary counselor has access to enroll the customer into the program(s) in which the customer is enrolled. If the secondary counselor has the ability to enroll the customer into the program(s) in which the customer is enrolled, then the system will send them the task; if not then #3 occurs.

3. If the secondary counselor does not have the access to enroll the customer into the program(s) in which the customer is enrolled, then the system determines who enrolled the customer into the program and then determines if that staff person is still active in Toolbox. If they are still active, the system will send them the task; if not, then #4 occurs.

4. If the counselor who enrolled the customer is not active in Toolbox, then the system will send the task to the local staff person designated by Technical Support. (Special privilege in reference table assigned to designated individual within the region.)

Exit Warning Task Examples

Example 1 (Perfect Scenario)

Joe Smith is enrolled in the WIOA Adult program and it has been 60 days since he received a countable service. His primary counselor is Sally Sue and she only has the Welcome/Skills/Jobs hat title. Toolbox will send Sally Sue a Exit Warning task.

Example 2 (Primary not able to enroll customer into the program in which they are enrolled)

Jim Smith is enrolled in the WIOA Youth program by Sam Jones and it has been 60 days since he received a countable service. His primary counselor is Sally Doe who has the Welcome/Skills/Jobs and WIOA Youth Specialist hats. When Sally was assigned as primary counselor, she was assigned under her Welcome/Skills/Jobs hat. Because Sam Jones enrolled Jim into the WIOA Youth program, Toolbox will send Sam Jones the task.

EXPLANATION-While Sally has a WIOA Youth hat, she was assigned as primary counselor under her Welcome/Skills/Jobs hat. Welcome/Skills/Jobs hat is not able to enroll a participant in the WIOA Youth

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program. Because of this, the system referenced the counselor who enrolled the customer into WIOA Youth to determine if they were still an active case manager. Sam was still an active case manager so Sam received the task.

Example 3 (Primary not able to enroll customer into the program in which they are enrolled and the enrollment counselor no longer active in Toolbox)

Jim Seeker is enrolled in the WIOA Youth program and it has been 60 days since he received a countable service. His primary counselor is Susan Doe who has the Welcome/Skills/Jobs and WIOA Youth Specialist hats. When Susan was assigned as primary counselor, she was assigned under her Welcome/Skills/Jobs hat. John Jones enrolled Jim Seeker into the WIOA Youth program but he is no longer an active case manager. Jennifer Tester is the individual in the region designated to receive tasks if all other rules fail. Because Susan did not have the WIOA Youth Specialist hat when she was assigned Jim's primary counselor, and because John is not longer an active case manager, Jennifer receives the task.

EXPLANATION-While Susan Doe has a WIOA Youth hat, she was assigned as primary under her Welcome/Skills/Jobs hat. Welcome/Skills/Jobs hats are not able to enroll a participant in the WIOA Youth program. Because of this, the system referenced the counselor who enrolled the customer to determine if they were still an active case manager. John was not an active case manager so Jennifer received the task.

COUNTABLE and NON-COUNTABLESERVICES

Only the Employment Plan and 9002 services listed as Countable will extend program participation and keep a record from exiting. Non-Countable Employment Plan and 9002 services are required for reporting purposes, but do not extend program participation and do not prevent a record from exiting.

NOTE: Services that are bold and italicized are Training level services (i.e services that will prevent a customer from exiting until the service is ended).

EMPLOYMENT PLAN COUNTABLE SERVICES (listed by Objective)

OBJECTIVE	COUNTABLE SERVICE NAME
➢ Assessment	2001 WIOA Comprehensive Assessment
➢ Assessment	2002 WIOA Full Development of an Individ Emp Plan
➢ Assessment	4005 WIOA Planned Gap
➢ Basic Education	2006 WIOA Short Term Pre-Vocational Services
➢ *Basic Education*	*Basic Skills/Remediation*
➢ *Basic Education*	*Trade Basic Skills/Remediation*
➢ *Basic Education*	*Trade Pre-Requisite Training*
➢ Career Pathways	Career Pathways – Assessment
➢ Career Pathways	Career Pathways - Guidance & Counseling
➢ Career Pathways	Career Pathways - Pre-employment Track
➢ Career Pathways	Career Pathways- Orientation
➢ DRJP	DRJP Adult Education and Literacy
➢ DRJP	DRJP After Temp Empl Supportive Service 2
➢ DRJP	DRJP Comprehensive Assessment
➢ DRJP	DRJP Customized Screening and Referral
➢ *DRJP*	*DRJP Customized Training*
➢ *DRJP*	*DRJP Employment*
➢ *DRJP*	*DRJP Entrepreneurial Training*
➢ DRJP	DRJP Full Development of an Individ Emp Plan
➢ DRJP	DRJP Group Counseling
➢ DRJP	DRJP Individual Counseling
➢ DRJP	DRJP Internships
➢ *DRJP*	*DRJP Job Readiness Training*
➢ DRJP	DRJP Needs-Related Payments
➢ *DRJP*	*DRJP Occupational Skills Training*
➢ *DRJP*	*DRJP On-the-Job Training*

- ***DRJP*** — ***DRJP Private Sector Training Programs***
- DRJP — DRJP Safety Course
- DRJP — DRJP Short Term Pre-Vocational Services
- DRJP — DRJP Supportive Services
- ***DRJP*** — ***DRJP Workplace Training and Cooperative Education***

- ***Employment Related Education*** — ***3001 Occupational Skills Training (AD & DW)***
- ***Employment Related Education*** — ***3002 On-the-Job Training***
- ***Employment Related Education*** — ***3003 Workplace Training and Cooperative Education***
- ***Employment Related Education*** — ***3004 Skills Upgrading and Retraining -***
- ***Employment Related Education*** — ***3005 Entrepreneurial Training***
- ***Employment Related Education*** — ***3006 Job Readiness Trainingy***
- ***Employment Related Education*** — ***3007 Adult Education and Literacy -***
- ***Employment Related Education*** — ***3009 Customized Training***
- ***Employment Related Education*** — ***3010 Registered Apprenticeship***
- ***Employment Related Education*** — ***3011 Incumbent Worker Training***
- Employment Related Education — 3012 Transitional Jobs
- ***Employment Related Education*** — ***3014 WIOA Pre-Apprenticeship***
- ***Employment Related Education*** — ***Federal Training***
- ***Employment Related Education*** — ***Trade Occupational/Vocational Education Training***
- ***Employment Related Education*** — ***Trade On-The-Job Training (OJT)***
- ***Employment Related Education*** — ***Work Ready Occupational Training***
- Employment Related Education — RES - Referred to Training

- Intensive Employment Services — Profiling Job Placement and Serv Referr to Employe
- Intensive Employment Services — Profiling Referral to Education and Training
- Intensive Employment Services — Profiling Workshops and Job Clubs

- Job Search Assistance — 2009 Out-of-Area Job Search Assistance & Relocation
- Job Search Assistance — Trade Re-location Allowance
- Job Search Assistance — Job Search Assistance
- Job Search Assistance — NEG Workshop
- Job Search Assistance — Out of Area Job Search Allowance
- Job Search Assistance — Pre/Post- Employment Training Workshops
- Job Search Assistance — Relocation Allowance
- Job Search Assistance — Trade Job-Search Allowance

- Life Skills — 2003 Group Counseling
- Life Skills — 2004 Individual Counseling
- Life Skills — 2020 Financial Literacy
- Life Skills — 2021 Workforce Preparation

- Orientation   Profile Orientation

- Supportive Services   4003 Supportive Services

- WIOA Youth Services   601 Dropout Prevention and Recovery
- ***WIOA Youth Services***   ***602 Alternative Secondary School Services***
- WIOA Youth Services   603 Summer Employment Opportunities
- ***WIOA Youth Services***   ***605 Occupational Skill Training (Youth)***
- WIOA Youth Services   606 Leadership Development
- WIOA Youth Services   607 Supportive Services (Youth)
- WIOA Youth Services   608 Adult Mentoring
- WIOA Youth Services   609 Follow Up Services
- WIOA Youth Services   610 Comprehensive Guidance and Counseling
- WIOA Youth Services   611 Objective Assessment
- WIOA Youth Services   612 Individual Service Strategies
- WIOA Youth Services   613 Prepare Post Secondary Educ Opport/Employ Opp
- ***WIOA Youth Services***   ***615 Pre-apprenticeship Programs***
- ***WIOA Youth Services***   ***616 On-the-Job Training Opportunities***
- ***WIOA Youth Services***   ***617 Internships and Job Shadowing***
- ***WIOA Youth Services***   ***619 Education for Workplace Preparation***
- WIOA Youth Services   620 Financial Literacy Education
- ***WIOA Youth Services***   ***621 Entrepreneurial Skills Training***
- WIOA Youth Services   622 Labor Market Information
- WIOA Youth Services   Dropout Prevention and Recovery
- WIOA Youth Services   Dropout Recovery Services

- Work Site Learning   2010 Internships And Work Experiences
- Work Site Learning   2011 Career Planning
- ***Work Site Learning***   ***Paid Work Experience***
- ***Work Site Learning***   ***Trade Apprenticeship***
- Work Site Learning   WRM 2014

- **Youth Services**   **503SJL Summer Youth Employment Opportunities**
- **Youth Services**   **503YSP Summer Youth Employment Opportunities**
- Youth Services   507SJL Supportive Services
- Youth Services   507YSP Supportive Services
- Youth Services   511SJL Youth assessment
- Youth Service   511YSP Youth assessment

9002 COUNTABLE SERVICES

- Assessment
- AutoMoConnections
- AutoOptimalResume
- Career Guidance
- CR101 Remediation
- DVOP IEP
- DVOP INTERVIEW PREP
- DVOP RESUME PREP
- Federal Bonding
- Financial Aid Information
- Initial Assessment
- Job Development
- Job Referral
- Job Search Activity
- JobsMoGov Self Job Search
- MO Connections
- Non WIOA Training
- ONET
- Optimal Resume
- Outreach and Intake
- Placed In Training
- Provide LMI Information
- Referred to Other Services
- Referred to WIOA Services
- Referred to WIOA Services-Manual
- Resume Assistance
- RJS Assessment
- RJS Job Search Review
- RJS LMI Career Information
- RJS Orientation
- Self-Service LMI
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  Staff-Assisted LMI
- Testing-Assessment
- Testing-Proficiency
- Workkeys Assessment
- Workkeys Test
- Workshop-Career & Skills Assessment
- Workshop-Career Advancement and Enhancement
- Workshop-Educational and Personal Skills Upgrade
- Workshop-Job Search

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EMPLOYMENT PLAN NON-COUNTABLE SERVICES

OBJECTIVE	NON-COUNTABLE SERVICE
➢ Follow Up	5009 WIOA Follow Up Services
➢ H-1B	MIIA Classroom Occupational Training
➢ H-1B	MIIA Contextualized Learning
➢ H-1B	MIIA Customized Learning
➢ H-1B	MIIA Distance Learning
➢ H-1B	MIIA Incumbent Worker Training
➢ H-1B	MIIA On-The-Job Training
➢ H-1B	MIIA Other Occupational Skills Training
➢ Treatment	Treatment Support Activity
➢ REA-Reemployment and Eligibility Assessments Plan Dev	REA-Eligibility Review and Work Search
➢ REA-Reemployment and Eligibility Assessments	REA-Individual Employment Plan
➢ REA-Reemployment and Eligibility Assessments	REA-Labor Market Information
➢ REA-Reemployment and Eligibility Assessments Reemployment Services	REA-Orientation/Referral to
➢ REA-Reemployment and Eligibility Assessments	REA-Work Search Verification

9002 NON-COUNTABLE SERVICES

➢ JOBS Self Registration
➢ Membership
➢ Partnership-Project Xcel
➢ Staff-Entered Record
➢ UI Weekly Claim
➢ WIOA Follow Up